

## **MEMORANDUM**

To: Social Security Advisory Board  
Subject: Representative Payee Research – Project Update  
Date: July 16, 2015

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### **Project Update**

Over the course of the past month, SSAB staff have begun researching and collecting information on representative payees. This includes assembling and examining SSA data on rep payees & beneficiaries, researching and collecting relevant past reports and literature on rep payees, and scheduling meetings/conference calls to consult with various experts and rep payee related organizations. For information not easily accessible, Jeremy has sent requests to SSA for. Current outstanding requests include:

- Recommendations from the 2007 National Research Council report that SSA has implemented to date (if applicable);
- Information on appeal rights for beneficiaries who disagree with SSA's incapability determination; and
- Data on various characteristics of beneficiaries with payees (e.g. by impairment type, type of payee, beneficiary type, etc.)

In addition, weekly conference calls have been held to discuss research updates and project ideas with Board members involved with the project. Jeremy has been adding any new ideas that come up to the initial report outline and will continue to edit where appropriate.

### **October Symposium on Representative Payees**

SSA has agreed to host a rep payee "symposium" at the agency's headquarters in Baltimore, on October 23 (the day of the October Board meeting). The symposium would be similar to what was held in Baltimore on the topic of CDRs in January 2014. Before the Board began to tackle CDRs and pulling together a panel of experts to research the issue, we had several discussions with SSA and quickly learned that they were broad – crossing over many different areas and amongst several components. It was decided that a full day meeting to discuss with the different components would be helpful. After initiating research on Rep Payees we believe that this issue is similar to CDRs in that it encompasses many different topic areas, such as SSA operations, systems, retirement & disability policy, appeals, and oversight. The plan is for the Board to meet with various components during the day, followed by a separate session with the Office of Inspector General (OIG).